**OCLC Discontinuation of Institutional Records (IRs): Response from Art Museum Libraries**

 OCLC’s March 18 announcement that creation of institutional records via batchload will cease in December 2015 and in June 2016 via Connexion is a cause for concern among the network’s art museum library membership, particularly those with substantial collections of rare books.

 The announcement has generated much discussion among art museum libraries that have depended upon institutional records from peer institutions for important bibliographic details. Copy-specific information regarding physical description, provenance, annotations, and local call numbers is extremely valuable to researchers in identifying scholarly material; it is also important to catalogers seeking guidance on classification and subject access points for their own bibliographic records. Deleting institutional records will, if we read the announcement and FAQs correctly, prevent discovery and display of this information in WorldCat. Although WorldCat records contain links to local catalogs’ entries in many cases, the coverage is by no means universal: Local bibliographic records that lack OCLC control numbers will return no results when the link is clicked.

 Although four of the libraries polled have few or no IRs, the other six affirmed the utility of copy-specific information found in these records. The following comments excerpted from responses received from the ten art museum library members listed below indicate the need for further explanation about the ultimate disposition of institutional records and local bibliographic data.

 We urge the IR conversion team to clarify how LBD will be configured and urge that valuable local information be made discoverable and visible in WorldCat and in Connexion.

*Cleveland Museum of Art – Ingalls Library*

*Frick Art Reference Library*

*Getty Research Institute*

*Metropolitan Museum of Art – Thomas J. Watson Library*

*Morgan Library & Museum*

*Museum of Fine Arts, Boston Library*

*Museum of Modern Art Library*

*National Gallery of Art Library*

*Philadelphia Museum of Art Library*

*Saint Louis Art Museum Library*

*Smithsonian American Art Museum/National Portrait Gallery Library*

* *… We have been concerned since the announcement came out about the IRs being discontinued.  We use IRs and find other libraries’ local edits very valuable.  I have read about the local bibliographic data fields, but not being able to view other libraries’ LBD is a serious drawback.  It feels like OCLC is reneging on a promise made to the former RLG libraries.  Many selected and stayed with RLG because of the usefulness other libraries local data, especially in unique and rare items.*
* *…From my own perspective as an art cataloger (and former rare book cataloger) the gist of the matter is that having access to more data is generally preferable to having less data. As anyone who does much cataloging quickly recognizes, even when applying agreed upon standards there is generally more than one way to describe almost any resource, and frequently more than a single view of what that resource is about. For this reason I always look at one or more of the IRs attached to any resource that I’m cataloging, concentrating on the records belonging to institutions … whose cataloging is highly reliable and consistent with the specific needs and practices of specialized art libraries. If nothing else, such IRs can be a valuable source of ideas for both description and subject analysis; in many more cases the ability to derive a record directly from a highly compatible IR, rather than the generic master record, can potentially eliminate a good deal of editing, recoding, and simple data entry that would otherwise be necessary. Better records faster, in other words. Thus I think the elimination of IRs would be a great loss.*
* *… I find myself looking at other IRs less and less, in part, I believe, due to time constraints. At the same time, I might look at other library local catalogs rather than the IRs in OCLC because the holdings I need may not be in an IR Library. At the Library we still see the value of IRs, however, and occasionally will refer to them for copy specific information. We have significant concerns about what we will be missing if they are no longer available.*
* *… A major concern about discontinuing IRs:  We find that a number of our older holdings, often original records and unique or rare items, are attached to the wrong OCLC record.  These are discovered most often when ILLs are requested (and we find that we don’t actually have the item being requested), or during projects to clean up and update records such as our (original) vertical file records.  During reclamation these records were quite often attached to the wrong bib record in addition to or instead of being added as original, unique records in OCLC.  If we lose access to our institutional records in OCLC, the Library will have limited ability to sort through and correct these many holdings errors.*
* *… IR records are absolutely valuable to us. A high percentage of our cataloging staff chooses the IR record over the master record because of the additional information included (i.e. description, better subject analysis, additional exhibition information, removal of FAST subject headings). Our process involves cataloging via Connexion in OCLC and exporting our records to Aleph. “Local data” which only pertains to our library is added after export in Aleph.*
* *… When the Library first migrated to OCLC --per the demise of RLIN-- we were scandalized by the thought of losing our own local data and access to local cataloging practices of other libraries. Even though, over those years, the quality of cataloging had been evolving towards a sameness in RLIN (e.g., the increase in routine or uncritical acceptance of primary cluster member’s contributions, etc.) most of us in the community appreciated the availability of multiple records upon which to base our records, nonetheless. And we respected the individual local practices of other libraries even if we did not absorb them into our records.*

 *When the complaint emerged, during the migration to OCLC, about the loss of RLIN record clusters, and when, finally, OCLC announced their solution of appending Institution records, to Master Records, many of us, myself included, were relieved. In addition, I was hoping the flood of new IRs in OCLC would encourage a flowering of individual practices and we’d see all sorts of creative approaches that would enrich the OCLC community. That hope was never materialized; it seemed as if most new IRs were copies of their MRs. At the time we believed this might have been the result of the widespread transfer of work responsibilities from professional to non- and paraprofessional workers, nationwide. … But it was the implementation of the “Expert Community” program in OCLC that I now believe pretty much spelled the death knell for Institution Records as a viable resource. Once contributors were allowed to improve or flesh out Master Records, that did the trick --for us, at least.*

 *With the Expert Community approach, if I came across an IR with a preferred detail, say, an LC call number that was completely absent from the MR, I’d enhance the MR with that call number I had found in the IR (assuming it was correct and appropriate) and I’d pull in the MR to our local system, not the IR. That way I exercised appropriate cooperative duties to the community at large. The IR helped, but, whereas before it had been a static attachment to the MR, now it was both static and a mere copy of the MR.*

 *What will we do with our almost 300,000 IRs? My recommendation will be that we retain them in their new “morphed” form as Local Bibliographic Data.   Why?  Some of the data from RLIN days are useful for identification and location.  Yes, it’s true, that information is available in our local system, but, on principle, I’m in favor of retaining the information in OCLC as backup storage.   One of the great features of a national utility is that our data are stored, complete, off site.  Also, there’s no need to throw out, wholesale, many thousands of records, especially as there will no costs involved.*

 *Before this migration to LBD records, I would love to see a demonstration of what they will look like in WorldCat .org as well as Connexion.*

* *… The library opted to preserve IRs during the RLIN transition, and we create fully cataloged IRs in the Connexion client and download the finished record into our local system, Voyager. We also made an effort to insert OCLC numbers into our local database records, so WorldCat links take users right into records in our local system. At the time we decided to do all these out of a conviction to share our records and our local data with the larger community. We also benefit from IRs accessible through the Connexion client when we catalog. Many times we use IRs to derive a new master or institution record, because they are of higher quality.*

*... We were asked to provide instructions about the fate of our IRs. I haven't had sufficient time to study the LBD option. Based on cursory understanding, it will not serve the two roles that IRs have performed until now: to share our data with peer institutions in a single pool, and to benefit our cataloging workflow by access to higher level records created by other institutions.*

*I could use some insights how LBD could be an option for us considering the above two roles. If LBD does not help with those, I'm inclined to have our IRs deleted. We would still catalog into OCLC and pull the OCLC record number into our local system, so the link from WorldCat would continue to take users to our local catalog data.*

*A lot of discussion about this development takes place on the DCRM list (not on EXLIBRIS). Institutions applying the DCRM suite are recording a lot of copy-specific data, and they care about sharing their records with the world. The focus is on bibliographic research. Perhaps a somewhat broader question to the Research Libraries Group may be how they see their role in fostering this type of bibliographic research. The discontinuation of IRs is a step back for this community. If IRs were not the best way to achieve this kind of bibliographic sharing, has OCLC (or the Research Libraries Group) looked into other methods of making this type of bibliographic data available?*

*Compiled by Roger Lawson, National Gallery of Art Library*